

THE ORGANIZER

Decision Maker and
Computerized Diary

BP 202



USER'S GUIDE

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THE ORGANIZER

Personal Manager and
Personalized Diary

USER'S GUIDE

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PREFACE

This manual is a tutorial approach to the Schedule * 64 program.

Section I is an Introduction to Schedule * 64. Also included, is an overview of the program and a list of specific user conventions referred to throughout this manual.

Section II provides a step by step description on how to turn on the equipment and load the Schedule * 64 program.

Sections III, IV and V describe in detail each of the Schedule * 64 menu options.

USER CONVENTIONS

It is recommended that you familiarize yourself with the Commodore keyboard. Here is a brief description of certain keys and symbols, and their respective function in reference to Schedule * 64 and this manual.

CLR/HOME

To return to the beginning of the screen you are working on, press the **CLR/HOME** key. All the data that has previously been input, will remain intact. This is referred to as the **Home** function.

To cancel and clear the field currently in operation, press **CLR/HOME** key in conjunction with the **SHIFT** key. The program will return to the beginning of the field. This is referred to as the **Clear** function.

←

CRSR

→

To move the cursor to the right, within the data entry field, press the **CRSR** key. For cursor movement to the left, press the **CRSR** key in conjunction with the **SHIFT** key.

←

To escape from whatever you are doing at the moment and return to the main menu of options, press the ← key.

INST/DEL

To move all of the data one character to the left, press the **INST/DEL** key. This may be used to delete data or empty spaces.

↑ **CRSR** ↓

To move the cursor downward from field to field within a data entry screen press this key. For cursor movement upwards from entry field to field with a data entry screen, press this key in conjunction with the shift key.

INST/DEL

To move the data one character to the right, press the **INST/DEL** key in conjunction with the **SHIFT** key. Thus, a blank position is created for a necessary space, or the insertion of a character.

(CR)

To continue on with the program after a line of input, press the **RETURN** key.

SHIFT

To input the upper case convention of a letter, or to use the top portion

of a special key, press and hold the **SHIFT** key in conjunction with the desired key. Then, release both keys at the same time.

To represent the screen's cursor, **_** this symbol will be used to indicate the position where the next input character will be placed.

PLEASE NOTE: The Schedule * 64 menu screens are included throughout this manual. Due to page size restrictions, **we have had to occasionally abbreviate prompts.**

Introduction to the "Organizer"

1.1 Overview

Welcome to the "Organizer." This book contains two programs for your Commodore 64 computer for quick, easy-to-use, yet powerful and sophisticated information generation.

Each program operates independently. However, it can all be fully integrated with Calc Plus to provide a comprehensive decision making tool for users such as:

Business Owners
Accountants
Farmers
Doctors
Dentists
Attorneys
Consultants
Managers
Executives
Home Owners
House Wives

This manual will fully describe the functions and features of Finance 64 and Schedule 64. Two other programs available for your Commodore 64 are those contained in the book Spreadsheet Plus (which includes spreadsheets with integrated graphics and plot 64) and is fully integratable with "The Organizer."

What is Spreadsheet Plus?

Spreadsheet Plus – Spreadsheet 64

Save hours and hours of time in the preparation and solution of virtually any number of problems you may encounter.

e.g.

- Budgets
- Cash Flow Forecast
- Floor Planning Models
- Stock Fluctuation
- Land Crop Returns

Accountants, farmers and business owners will find Spreadsheet 64 invaluable for the day-to-day "What if?." You need not be a programmer; it's simple, straightforward, and easy to use with explanatory commands, and predefined mathematical calculations. Spreadsheet 64 makes "Crystal Balling" loads of fun while providing valuable information for informed decision making and better understanding of your business and the variables that affect it. Truly an extremely valuable decision making tool.

Spreadsheet Plus – Plot 64

This simple, easy-to-use program automatically creates high resolution graphs and charts. With hardly any programming you can visualize data in various different formats.

This data could be from Spreadsheet 64.

Plot 64 not only helps you to understand the merit of facts in a clear concised manner but also helps you communicate to others in reports and presentation.

You can chart . . .

- . . . stock price fluctuation,
- . . . yearly football statistics,
- . . . business trends,
- . . . population, production or market surveys.

And the displays can be in many and varied formats . . .

- . . . line graphs,
- . . . bar graphs,
- . . . pie charts.

“The Organizer” – Finance 64

Provides answers to the important decision criteria faced by business, home owners and housewives daily.

Should we buy or lease a new machine?

Will this machine be profitable or not?

Can we take a loan with interest so high?

What would our monthly prepayment on our loan be...today...five years...10 years?

Know what our selling price is, what is our profit margin in present and future value?

Ordinary annuities?

Back pay analysis?

Annuities due...and more.

Step 1

Remove the diskette from the front cover pocket. Insert the diskette with the label face-up. Close the disk drive door.

Step 2

Enter: LOAD "SCHEDULE" 64: A, 1 (CR)

The screen will display:

SEARCHING FOR SCHEDULE " 64

LOADING

READY

Enter: RUN (CR)

"The Organizer" – Schedule 64

You now have the use of a fully computerized diary to keep track of all your appointments and bookings, record all important dates and future commitments, and get instant reminders by day...or week...or month. You and Schedule 64 will never forget again. Type in whatever information you want to keep and retrieve it instantaneously. It's like having "total recall!"

Schedule 64 will . . .

- ... highlight your appointments,
- ... eliminate double bookings,
- ... provide instant daily or weekly scan,
- ... prints schedule daily, weekly, monthly or yearly.

Use Schedule 64 to . . .

- ... keep track of your "to do list" that could be updated or changed at any time,
- ... plan your days ... weeks ... months ... ,
- ... diarize and maintain important information,
- ... provide a project management diary control tool.

Anyone and everyone who needs to keep track of appointments, have instant access to information schedules. Tabulate and evaluate booking and effective management and control time needs.

- * Budgets
- * Cash Flow
- * Floor Planning Models
- * Stock Fluctuation
- * Land Cost Returns

Accountants, lenders and business owners will find Spreadsheet 64 invaluable for the "what-if" analysis. It's simple, straightforward, and easy to use with explanatory comments and predefined mathematical calculations. Spreadsheet 64 makes "Crystal Balling" fun while providing valuable information to help you make the most of your business. It's a truly an extremely valuable decision making tool.

SECTION II GETTING STARTED

2.1 Powering Up the Equipment

Insert the Joystick port adapter into control port 1 before turning the computer on. (Make sure that it remains in place whenever the program is in use.)

Before turning on the power to the disk drive unit, lift up the disk drive door to make sure no diskette was left in the machine by mistake. Remove any diskette to avoid possible loss of data.

There are three pieces of equipment to turn on: the computer, the disk drive, and a printer.

A few seconds after turning the power on, the screen should clear and display the following message:

```
Commodore 64 Basic V2
64 K Ram System 38911 Basic Bytes Free
Ready
```

2.2 Powering Down the Equipment

Before powering down any of the equipment, remove any diskettes which may be in the disk drive unit. (Be sure to store all of your diskettes in an envelope, in an upright position in a diskette notebook or case.) Turn the power switch to the "OFF" position.

2.3 Running the Schedule * 64 Program

The Schedule * 64 program is resident on the diskette that comes in the front cover of this manual. Follow the three easy steps listed below to load the program.

Step 1

Remove the diskette from the front cover pocket. Insert the diskette with the label face-up. Close the disk drive door.

Step 2

Enter: **LOAD "SCHEDULE * 64",8,1 (CR)**

The screen will display:

```
SEARCHING FOR SCHEDULE * 64
LOADING
READY
```

Enter: **RUN (CR)**

Getting Started

Step 3

Input the **DATE** in the following format:

MM/DD/YY (CR)

The prompt for '**Time**' will then be displayed. Input the time in the following format:

HH/MM (CR)

The following menu screen itemizing the Schedule * 64 operations that can be initiated will be displayed.

DATE Schedule * 64 TIME

- 1. AT A GLANCE**
- 2. SCAN FOR NEXT AVAILABLE**
- 3. SCAN EVENTS**
- 4. ADD/CHANGE EVENTS**
- 5. DELETE EVENTS**
- 6. DESCRIPTOR TABLE**
- 7. ADD/CHANGE TYPES**
- 8. DISK CONTROL**
- 9. EXIT**

SELECTION: __

Note:

The cursor is positioned, ready and waiting, for your selection. If the port adaptor is not used, the cursor will not appear. This will cause the program to lock up at this page. Return to Section 2.1. Pressing any number (1-9 and CR) will allow you to complete the function of your choice.

SECTION III

USING THE ORGANIZER

INTRODUCTION

The Schedule * 64 program turns your Commodore Computer into a full automatic diary. With this program you can enter your appointments, assign them priorities, scan and display days at a glance, print your schedules and avoid double-bookings and missed appointments.

Schedule * 64 is very easy to use. There is no detailed syntax to learn or reference, no special keyboards to memorize and no abbreviations to confuse you.

The Schedule * 64 programs are menu-driven. This means that at all times a menu of options will display and you choose what you want to do.

With the very simple technique of selecting the number on the menu that corresponds to your choice and pressing this number on the keyboard, you may select any item from the menu.

In addition, the cursor, the little blinking box that appears on the screen, will always guide you through any and all Schedule * 64 functions.

3.1 Menu Options

This section describes in detail the menu selections. Each description includes an introduction and an explanation of terms. This manual will discuss the options in the order required for:

1. Setting up your Schedule * 64 files
2. Adding/Changing information in those files
3. Scanning the files for information
4. Saving information on disk

3.2 Explanation of Each Menu Option

1. AT A GLANCE

Schedule * 64 keeps track of all appointments, bookings or any type of information you have entered into the system. 'At A Glance' enables you to refresh your memory regarding this information. You may view a DAY, WEEK, MONTH or YEAR at a glance.

2. SCAN FOR NEXT AVAILABLE

This function allows you to instantaneously scan your diary in order to determine the earliest possible 'FREE TIME SLOT'.

Using Schedule * 64

3. SCAN EVENTS

A quick method for retrieval of appointment or booking information within certain defined time ranges.

4. ADD/CHANGE EVENTS

This function allows for the entry and edit of appointment and booking information. All the data is entered via this function.

5. DELETE EVENTS

A simple function allowing you to remove data that you no longer require.

6. DESCRIPTOR TABLE

Schedule * 64 can be used for a multitude of purposes. The system is so flexible that you the user can describe the ACTUAL WORDING of your tables so as to utilize the systems to your best advantage.

7. ADD/CHANGE TYPES

Allows you the user may assign a type number to facilitate easy cross-referencing and recall for Schedule * 64 and yourself. The type simply indicates the priorities and breakdown of your proposed events.

8. DISK CONTROL

Simply allows for saving of data onto disk, loading a data file from disk, deleting an entire file from disk, initializing a new disk for data storage and obtaining a listing of all files you may have on a data disk.

In addition this utility allows you to obtain a listing either on the screen or a printed copy of all the files you have on your disk.

9. EXIT

Exit unloads the Schedule * 64 program from the Systems memory and returns you to the BASIC MODE.

We are going to follow a logical sequence in learning how to operate and use Schedule * 64. Some of our steps are seldom used, such as setting up our Descriptor, 'TYPE' and 'EVENTS' tables. However you will have a complete knowledge and understanding of Schedule * 64 by following our guide through the system.

3.3 Descriptor Table

Before entering any information you, the user must set up the descriptor table to reflect what you want to use Schedule * 64 for. The descriptor table is option #6 on the Schedule * 64 Main Menu.

Select option '6' and the following screen displays:

TYPE

PRIORITY

Using Schedule * 64

DESCRIPTION 1

DESCRIPTION 2

ARE YOU SURE?

This option will allow you to alter any of these headings so as to customize the system for your own use.

Some examples will clarify how to use the table.

EXAMPLES

- A. You are the manager of a Tennis and Racquet Ball Club. You wish to use Schedule * 64 to keep track of your current booking.

Using the 'Descriptor Table' option you may alter the HEADINGS as follows.

TYPE = Court Type (1 = Tennis
2 = Squash
3 = Handball and so on)

PRIORITY = Court #

DESCRIPTION 1 = Booked by:

DESCRIPTION 2 = Membership #

Changing the HEADINGS above will cause Schedule * 64 to use these descriptors throughout the system. This will become apparent as you move on.

- B. You are the receptionist in a Doctors Clinic. You are going to use Schedule * 64 for patient appointments for all the doctors at the clinic.

You may use the descriptor table as follows:

TYPE = Doctor Code #

PRIORITY = Priority (1 = Urgent
2 = Regular
3 = Emergency and so on)

DESCRIPTION 1 = Patient Name

DESCRIPTION 2 = Billing Name

- C. You are the headmaster at a school. You wish to allocate classrooms on a daily basis. The descriptor table could be used in 2 ways.

TYPE = 1 ROOM # OR 2 TEACHER #

PRIORITY = PRIORITY OR PRIORITY

Using Schedule * 64

DESCRIPTION 1 = SUBJECT OR GRADE
DESCRIPTION 2 = GRADE OR SUBJECT

Your choice will be dictated by your particular needs.

- D. You are the Project Manager on a construction site. You wish to use Schedule * 64 to prioritize and keep track of the tasks that have to be performed and when they should be performed.

TYPE = EVENT/TASK #
PRIORITY = TASK PRIORITY
DESCRIPTION 1 = TASK DESCRIPTION
DESCRIPTION 2 = RESPONSIBLE PERSON

- E. You are a housewife. You wish to use Schedule * 64 to keep track of things to do around the house, the children's schedule etc.

TYPE = TYPE THE TASK (H) (1 = HOUSE-
WORK 2= DOCTORS APTS 3=
CHILDRENS ACTIVITIES AND SO
ON)
PRIORITY = PRIORITY (IMPORTANCE LEVEL)
DESCRIPTION 1 = DESCRIPTION OF TASK
DESCRIPTION 2 = PERSON INVOLVED

These 5 examples show some ways Schedule * 64 can be customized for your use. The number of alternatives is virtually unlimited.

The descriptor table set-up dictates what prompts appear throughout the system whenever you ADD, CHANGE, DELETE or RECALL information.

NOTE:

Once you have set-up a DESCRIPTOR TABLE, this information is not necessarily permanent. It can be changed at will. Furthermore you may use Schedule * 64 for more than 1 purpose hereby requiring more than 1 Descriptor Table. Each file may have 1 Descriptor Table.

Lets set up an example:

DESCRIPTOR TABLE

TYPE: COURT TYPE (CR)

(Do this by simply overtyping the existing type. Use the INST/DEL key to remove any charaters you do not wish to appear)

PRIORITY: COURT # (CR)

DESCRIPTION 1: BOOKED BY (CR)

Using Schedule * 64

DESCRIPTION 2:

MEMBERSHIP # (CR)

ARE YOU SURE:

Y (CR) (if the above information is correct)

N (CR) (if you wish to edit the above information)

Completing this function has effectively allowed you to customize Schedule * 64 for you with personal use. You are ready to begin establishing types for entry of information.

3.4 Entering Information

Two types of vital data are entered for Schedule * 64.

They are: 1) ADD/CHANGE EVENTS/APPOINTMENTS/BOOKINGS
2) ADD/CHANGE TYPES (the word TYPE will alter depending on your descriptor table set-up)

When you set-up the Descriptor Table it becomes apparent what a 'type' is. However you can define a TYPE as a particular parameter that you wish to keep track of.

Recapping a TYPE could be:

A COURT TYPE

A DOCTOR CODE

A TEACHER #

ETC.

By assigning a TYPE # or Code you facilitate easy cross-referencing and recall for Schedule * 64 and yourself.

3.5 Add/Change Types

Selecting option '7' the following screen displays.

DATE ADD/CHANGE TYPES TIME

- 1. ADD**
- 2. CHANGE**
- 3. DELETE**
- 4. LIST**

SELECTION: __

Each option can be selected by pressing the # corresponding to that option.

To Add a New Type:

Select option '1'(CR)

The following screen displays:

Using Schedule * 64

ADD TYPES

NEW TYPE 01

TYPE

DESCRIPTION: __

IS THIS CORRECT (Y/N): NUMBER OF TYPES USED:

NEW TYPE

When entering a new type the system assigns the next available number. If this # has a type assigned to it, the description will display and allow you to edit it.

TYPE DESCRIPTION

Enter the free format description you wish to use to describe the type (MAX 25 characters). Remember that you have assigned a descriptor to the word type in the descriptor table. In the given example it is 'COURT TYPE'. Some court types may be:

1. Tennis Courts
 2. Handball Courts
 3. Squash Courts
 4. Raquet Ball Courts
- Enter one of the above.

IS THIS CORRECT (Y/N)

A 'Y' or 'YES' response will save the type you have just established.

A 'N' or 'NO' response will allow you to return to the beginning of the screen and edit the data.

MORE TO DO? (Y/N)

'Y' will return the cursor to the beginning of the ADD TYPE screen allowing you to add another type.

Establish all the 'Court' types you require. (Remember the types are utilized by 'Schedule * 64' for your unique requirements).

Once you have established all your 'TYPES', respond to the;

MORE TO DO? 'N'(CR)*

This will return you to the ADD/CHANGE TYPES main menu.

*Note:

Always remember to press the (CR) key at the end of a Data Entry Field.

Using Schedule * 64

TO CHANGE A TYPE

Select option '2' 'CHANGE TYPES' from the TYPES MENU of selections.

The following screen displays:

CHANGE TYPES	
TYPE NUMBER:	
TYPE DESCRIPTION:	
TYPE NUMBER	Enter the number assigned to the type you wish to change.
TYPE DESCRIPTION	Edit the description.
IS THIS CORRECT (Y/N)	'Y' responses will save this 'NEW' type 'N' will allow you to edit it.

Once this is complete the prompt 'MORE TO DO?(Y/N)' will display.

'Y' will cause the cursor to reposition at the beginning of the 'CHANGE TYPES' screen ready for more changes.

'N' will allow Schedule * 64 to return to the 'TYPES' menu.

EXAMPLE

You wish to change 'Court Type '1'' from Tennis Courts to Handball Courts.

COURT TYPE:	01
DESCRIPTION:	HANDBALL COURTS
IS THIS CORRECT (Y/N)	'N' will exit this function and take you back to the ADD/CHANGE TYPES Menu of selections.

NUMBER OF TYPES IN USE Schedule * 64 automatically keeps track of all the types in use. The # in use at the time of ADDING A TYPE will display.

Note:

You must set-up all types prior to using Schedule * 64. If a type is not valid Schedule * 64 cannot identify it and process the information. An invalid type number causes Schedule * 64 to display the following message.

'INVALID TYPE NUMBER'

The cursor will remain in position to accept a valid type number. Simply enter the valid number over the invalid number.

EXAMPLES

Assuming you are the manager of the Racquet Club as previously discussed.

Using Schedule * 64

COURT TYPE 1 (TENNIS COURTS) (CR)

DESCRIPTION TENNIS COURT (CR)

IS THIS CORRECT Y (CR)

MORE TO DO 'Y' (CR)

COURT TYPE 02 (SQUASH) (CR)

DESCRIPTION SQUASH COURT (CR)

AND SO ON

DELETE TYPES

This function causes unwanted obsolete types previously established by you to be erased.

Select option '3' 'Delete Types' from the 'TYPES' menu.

The following screen displays:

DATE **DELETE TYPES** **TIME**

TYPE NUMBER: __

TYPE DESCRIPTION:

ARE YOU SURE? (Y/N)

TYPE NUMBER Enter the TYPE # you wish to erase.

TYPE DESCRIPTION Schedule * 64 will display the description that you have assigned to the TYPE # entered above.

ARE YOU SURE? Y will erase this type and the prompt

MORE TO DO?

will display.

MORE TO DO? Y response allows you to delete a future type.

A N response returns you to the 'TYPE' menu.

ARE YOU SURE? (Y/N) N will not delete this type and the cursor will return to the TYPE # prompt for further information.

Note:

You cannot erase or delete a TYPE that does not exist, therefore should you enter an invalid TYPE # Schedule * 64 will not accept it.

EXAMPLE

You wish to delete Squash Courts as you no longer have them available.

Using Schedule * 64

COURT TYPE: 2 (CR)
DESCRIPTION: SQUASH COURTS (CR) (displayed by the system)
ARE YOU SURE (Y/N) Y(CR)

LIST TYPES

This function simply provides either a display or printout of all the types you have established for Schedule * 64.

Select option '4' 'LIST TYPES' from the TYPES MENU.

This will cause all existing types to display as follows:

TP DESCRIPTION

01	TENNIS COURTS	11
02	SQUASH COURTS	12
03	HANDBALL COURTS	13
04		14
05		15
06		16
07		17
08		18
09		19
10		20

MORE/PRINT: _

Note:

The display will be limited to the space available on your screen. You may have established more TYPES than those presently visible on the screen.

To view more: Enter 'M' (CR)

This will cause the next full screen of Types to display. This procedure can be continued to encompass all the possible types.

Should you wish to obtain a hard-copy printout simply depress 'P' (CR) for print.

←: Causes Schedule * 64 to return to the 'MAIN' menu.

This completes the selection on:

1. ADDING NEW TYPES
2. CHANGING TYPES
3. DELETING TYPES
4. LISTING TYPES

Once you have established your unique TYPES you are ready to move onto the DAY-TO-DAY use of Schedule * 64.

3.6 Add/Change/Events

Once the Type's and Descriptor Table have been established we are ready to begin using the ADD/CHANGE/EVENT function. Note that every time a new appointment or event is scheduled this option will be used.

Select option '4' 'ADD/CHANGE/EVENTS

The following entry screen will display:

ADD/CHANGE/EVENTS

DATE:

TIME:

TYPE:

(will be substituted by your descriptor table)

PRIORITY:

(will be substituted by your descriptor table)

DESCRIPTION 1:

(will be substituted by your descriptor table)

DESCRIPTION 2:

(will be substituted by your descriptor table)

Select option you wish (1 character)

ADD/CHG/NXT: _

ie; A = ADD, C = CHG, N = NXT

Note:

Your screen prompts may be different depending on how you established your descriptor table.

ADDING EVENTS

This screen prompts you for all the information necessary to complete a record for this event or appointment and store the information in the files.

SELECT A (for ADD)

DATE

Enter the date of the proposed event in MM/DD/YY format.

TIME

Enter the time of the day that this event will occupy in HH:MM format.

Example: 8-30 am = 08:30
12-27 pm = 12:27
10-35 pm = 22:35

Using Schedule * 64

TYPE

In the previous section we discussed the setting up of type procedures. Each type of event or appointment has a numerical value associated with it. eg. If the descriptor table had been established for a Racquet Club the TYPE = COURT TYPE.

Enter the numerical value 0-99 that corresponds to the court type you wish to make a reservation for.*

PRIORITY

This prompt is important because the priority may be used to store varied information. In the Racquet Club example we use PRIORITY to designate court #. Refer to the descriptors examples for more ways that PRIORITY may be used.

*NOTE:

Entering a valid 'Type' causes Schedule * 64 to display the description of this type. An invalid 'Type' will not be accepted by Schedule * 64. The message 'UNDEFINED TYPE' will display. You may continue to enter an event even though you have an 'UNDEFINED TYPE' message.

DESCRIPTION 1:

Both these fields have been defined for your own personal use. Remember the example on the Racquet Club. Each field can accept maximum of 25 characters.

DESCRIPTION 2:

DESCRIPTION 1: = BOOKED BY

DESCRIPTION 2: = MEMBERSHIP #

Completion of these prompts returns you to the ADD/CHANGE/EVENTS screen, with the cursor waiting for your next command.

NXT/CHG

NEXT

Entering 'N' will store the information you have entered for this event or appointment and the cursor will reposition itself at the bottom of the screen ready for the input of the next command or appointment. ie ADD/CHANGE/NEXT

Note:

If you should try and enter an event or appointment in a time slot that already is occupied Schedule * 64 will display the existing event or appointment allo-

Using Schedule * 64

cated to the particular time slot. You may overwrite this information, field by field.

CHG

Entering 'C' will allow you to edit or change any previous event or appointment data you have input.

3.7 Delete Events

This function simply allows you to delete your records of either, event or appointments that have taken place (are history) or to erase an event or appointment that has been cancelled so as to make at time slot available.

Select option '5' 'DELETE EVENTS' from the Schedule * 64 Main Menu.

The following screen displays.

DELETE EVENTS

START DATE: —

END DATE:

START TIME:

END TIME:

PRINT BEFORE
DELETING Y/N:

ARE YOU SURE:

Complete the cursor prompts as follows:

START DATE:

END DATE:

Enter the date range you wish to delete. Note if you wish to delete only 1 event on a particular day the entry for START DATE and END DATE would be identical. Enter date in MM/DD/YY.

START TIME:

END TIME:

Enter the time range within a day you wish to delete.

Example: If you wish to delete a whole day beginning at 8:00am and ending at 5:00pm enter:

START TIME: 08:00 (CR)

END TIME: 17:00 (CR)

PRINT BEFORE
DELETING Y/N:

Do you want to print all the events or appointments before deleting them. Enter 'Y' for YES and 'N' for NO.

ARE YOU SURE:

The possible responses are YES and NO. 'YES' will complete the 'DELETE FUNCTION' 'NO' will cancel your entry and return you to the beginning of the delete function for further entry.

This completes the 'DELETE' function.

WARNING:

Care should be taken when using this function as once you DELETE RECORDS they are gone forever.

Section IV

RECALL AND VIEW THE INFORMATION

INTRODUCTION

Schedule * 64 is maintaining a diary of all events, appointments or bookings. Not only is the information being stored and available at any time, but in addition information on the type of event and the priority are also being maintained.

The benefits of 'Schedule * 64' only become apparent when we RECALL the information. This section will discuss the different ways we can RECALL the information so as to yield us some benefit. Each option such as:

1. AT A GLANCE
2. SCAN FOR NEXT AVAILABLE
3. SCAN EVENTS

yields some vital information that can be used to maximize on time management.

Lets look at each one independently.

4.1 At a Glance

This function allows us to access a specific time period to be reminded of the appointments or events that are scheduled for that time period.

Example 1: a housewife may wish to glance at her diary for the coming week.

Example 2: the medical receptionist wishes to see what the doctors schedule of appointments is for a particular day.

Example 3: a production manager wishes to see what his production deadlines for the year are.

That 'AT A GLANCE' function will allow you to see:

1. DAY AT A GLANCE
2. WEEK AT A GLANCE
3. MONTH AT A GLANCE
4. YEAR AT A GLANCE

AND: Schedule * 64 also allows you to focus on a day within a week, week within a month, month within a year and so on. This is known as the **ZOOM** feature.

Select option '1' 'AT A GLANCE'.

The following screens displays:

Recall and View the Information

AT A GLANCE

1. DAYS
2. WEEKS
3. MONTHS
4. YEARS

SELECTION: __

You have the option of glancing at a

- 1) DAY
- 2) WEEK
- 3) MONTH
- 4) YEAR

Depressing the # that corresponds to your selection will access the desired information.

4.2 Years At A Glance

Select option '4' from the 'AT A GLANCE MENU'

Schedule * 64 will prompt you as follows:

Start Year: Simply enter the first year of your proposed scan,
eg: '83'.

The results will display on the screen as follows:

1. A total of 5 years, starting with 1983, the selected Start Year, will display.
2. For each month of each year the YEAR AT A GLANCE tells you how many events or appointments are scheduled.
3. The cursor is positioned and waiting for your further PROMPT-

ZOOM, PRINT, EXIT: __

ZOOM

This is perhaps the most important feature of Schedule * 64, allowing you to FOCUS on 1 particular year and the 1 month within that year.

Should you select the ZOOM option 'Z', Schedule * 64 prompt for:

YEAR: The specific year you wish to FOCUS on.
eg: 87 (CR)

MONTH: The specific month within the selected year.
eg: March - Type in '03' (CR)

Schedule * 64 then displays the 1st eight days of the month, the month being 'March'.

This process can be continued thus allowing you to view the rest of the month by selecting the REST option 'R' for each successive 8 day period or portion thereof.

To complete this process: PRESS R(CR)

Using Schedule * 64

PRINT

Enter 'P' and the screen display of 'YEAR AT A GLANCE' will be printed.

EXIT

Enter 'E' and Schedule * 64 will return you to the 'AT A GLANCE MENU' waiting for your next selection.

Note:

You may ZOOM from a YEAR MONTH WEEK DAY. The procedure is simple. The prompts for MONTH WEEK and WEEK DAY are explained in the next 2 section.

4.3 Month At A Glance

This function can be accessed in 2 ways.

- 1) By zooming from a YEAR to a MONTH
- 2) By selecting option '3' from the 'AT A GLANCE MENU'

We have seen how method 1 works.

Method 2

Select option '3' 'MONTH' from the 'AT A GLANCE MENU'.

Schedule * 64 will then prompt for;

YEAR: The year you wish to focus on.

MONTH: The month you wish to see.

eg: Year [85(CR)] will display March 1985.

Month [03(CR)]

The following screen displays:

1. Only the first 8 days of the desired month displays. To view the remaining days of month the 'REST' command will be used.
2. The display indicates all the events or appointments for the month in question, even indicating DOUBLE BOOKINGS.
3. The cursor is positioned and waiting for your further prompt - **ZOOM, PRINT, EXIT, REST: _**

ZOOM you may focus on 1 particular week within the DISPLAY month.

Selecting the ZOOM option 'Z' Schedule * 64 prompts for:

WEEK BEGINNING: Enter the date that indicates the START of the week you wish to see, in MM/DD/YY format.

Completion of these prompts will allow Schedule * 64 to display the desired week.

Recall and View the Information

This process can be continued thus allowing you to ZOOM to a 'DAY AT A GLANCE'.

PRINT: Enter 'P' and a 'Month At A Glance' will be printed.

EXIT: Enter 'E' and Schedule * 64 will return you to the 'At A Glance Menu' waiting for your next selection.

REST: Enter 'R' and Schedule * 64 will display the remaining positions of the month.

Note:

You may ZOOM from a MONTH WEEK DAY. The procedure is simple. The prompts for WEEK DAY are explained in the next section.

4.4 Week At A Glance

This function can be accessed in 3 ways:

1. By Zooming from a YEAR MONTH WEEK.
2. By Zooming from a MONTH WEEK
3. By selecting option '2' from the 'At a Glance' Menu.

We have discussed METHOD 1 and METHOD 2.

METHOD 3:

Selection option '2' 'WEEK' from the 'At A Glance' menu.

Schedule * 64 will then prompt for;

WEEK BEGINNING: The data that indicates the START of the week you to see, in MM/DD/YY format.

Completion of this prompt will allow Schedule * 64 to display the desired week as follows.

1. Schedule * 64 always starts a 'WEEK DISPLAY' on the beginning date selected by you.
2. The display indicates all the events or appointments for the week in question, even indicating double bookings.
3. The cursor is positioned and waiting for your further prompt.

ZOOM, PRINT, EXIT: __

ZOOM You may focus on 1 particular day within the display week.

Selecting the ZOOM option 'Z' Schedule * 64 prompts for:

DATE: The day you wish to focus on in MM/DD/YY format.

Completion of this prompt will allow Schedule * 64 to display the desired day.

PRINT: Enter 'P' and the 'WEEK AT A GLANCE' will be printed.

Using Schedule * 64

EXIT: Enter 'E' and Schedule * 64 will return you to the 'AT A GLANCE' menu.

Notes

1. Each event or appointment is detailed within the time slot.
2. Each event or appointment has a priority assigned to it.
3. The cursor is positioned and waiting for your further prompt.

PRINT = 'P'

MORE = 'M'

EXIT = 'E'

ADD = 'A'

DELETE = 'D'

The possible prompts as shown above do the following:

'P' causes Schedule * 64 to print the entire 'DAY' you have focused on.

The next section 'DAY at a Glance' explains the 'Day at a Glance' screen in more detail.

4.5 Day At A Glance

This function can be accessed in 4 ways.

1. By Zooming from a YEAR MONTH WEEK DAY.
2. By Zooming from a MONTH WEEK DAY.
3. By Zooming from a WEEK DAY.
4. By selecting option '1' from the 'AT A GLANCE' menu.

We have discussed Methods 1, 2 and 3.

Method 4

Select option '1' 'DAY' from the 'AT A GLANCE' menu.

Schedule * 64 will then prompt you for:

DATE – The DAY in MM/DD/YY format you wish to focus on.

Completion of this prompt will allow Schedule * 64 to display the desired DAY.

You may now edit this information. The cursor awaits your instructions. You may:

PRINT (P)

Print this information

ADD=(A)

Add Events or appointments. Selection of the 'A' returns you to the ADD/-CHANGE EVENTS screen.

DELETE=(D)

Delete Events or appointments. Selection of the 'D' returns you to the DELETE EVENT screen.

Recall and View the Information

MORE = (M) More Events or appointments. Selection of 'M' will make next screen of events appear; only if there is more than one screen will this command be accepted by Schedule * 64.

4.6 Scan Events

This option is very powerful. It allows you to search your files in many ways to obtain information on events, the # of events in a category, or any matching events. Consider these examples.

- A) The tennis club wishes to know how many courts member # 123 has booked for a week.
- B) A doctor wishes to determine if any members of the 'Smith' family have appointments for the coming week.
- C) A housewife wishes to know if she has any conflicting arrangements at a specific time of the day.

The scan events option may be used in a variety of ways depending on your requirements. Simply complete the prompts applicable to the desired result.

Select option '3' from the Schedule * 64 menu.

The following screen displays:

Selection

Type
(substituted by the
descriptor table)

Priority
(substituted by the
descriptor table)

Date

Time

Description 1
(substituted by the
description table)

Description 2
(substituted by the description table)

From

To

Match Field

Data for Match

The prompts explained are:

Using Schedule * 64

TYPE	Consider example A above. The type would equal 'TENNIS COURTS'.
PRIORITY	Consider example A above. You could narrow you request down even further ie: How many times has member #123 booked Court #1 (Priority) for a particular week.
DATE	Should your request involve time fill in these prompts.
TIME	No time constraints are needed. Enter as follows: DATE: MM/DD/YY 00/00/00 TIME: HH/MM 00:00
Description 1	Consider example B. Simply fill in 'SMITH'.
Description 2	Consider example A. Simply fill in the membership #123.

4.7 Scan for Next Available

Schedule * 64 not only allows you to inquire into the status of your time, it also allows for the optimization of time usage not only for the user but for those being booked for appointments.

Consider the following example:

EXAMPLE

You are the receptionist at a Medical Clinic. A patient calls for an appointment. Schedule * 64 will allow you to SCAN the future to find the next mutually convenient time for the appointment.

The 'Scan for Next Available' is a very powerful segment of Schedule * 64 and yet it is very simple to use.

Select option '2' 'Scan for Next Available' from the Schedule * 64 main menu.

The following screen will display.

START DATE:

END DATE:

TIME FROM:

TIME TO:

TIME INTERVAL:

LUNCH TIME FROM:

LUNCH TIME TO:

NO OF EVENTS

PER INTERVAL:

Recall and View the Information

Complete the prompts as follows:

START DATE:

END DATE:

These 2 prompts will indicate to Schedule * 64 the range of dates you and the individual booking the appointment are contemplating.

Example: The patient calls with a headache and wishes to see the doctor as soon as possible. Sources may be:

START DATE: The inquiry Date

END DATE: The end of the week

Note: The START and END DATES are entered in MM/DD/YY format.

TIME FROM:

TIME TO:

The time of day the person booking the appointment is available.

Example: The patient can only come before 9:00 am.

TIME FROM: 08:00 am

TIME THRU: 09:00 am

TIME INTERVAL:

Enter the time required for the appointment eg: 30 minutes = 00:30.

LUNCH TIME FROM:

LUNCH TIME THRU:

This range dictates the hours of a day which cannot be used for appointments or bookings.

Example: The doctor takes lunch from 12:00pm-2:00pm.

Enter: FROM: 12:00(CR)

THRU: 14.00(CR)

NO OF EVENTS PER INTERVAL: Number of overbookings you will allow.

Completion of these prompts gives Schedule * 64 all the information needed to determine the next mutually convenient time slot for an event or appointment.

This time slot will display as follows:

DATE: TIME:

ADD/NEXT:

Note: Schedule * 64 displays the date and time of the next available slot.

Selection of the ADD prompt returns you to the ADD/CHANGE EVENT Screen.

Using Schedule * 64

Note: The date and time on the ADD/CHANGE screen will be preallocated.

Selection of the NEXT prompt displays the NEXT available TIME SLOT for this appointment should the 1st choice not be (acceptable).

Section V

SAVING INFORMATION

5.1 Disk Control

This option simply allows you to manipulate data on events and appointments to and from the storage device, in this case the disk.

You may complete the following functions using this menu option.

1. SAVE A FILE ONTO DISK
2. LOAD A FILE FROM A DISK
3. DELETE AN ENTIRE FILE FROM THE DISK
4. INITIALIZE (SET-UP) A CLEAN DISK FOR STORAGE OF DATA
5. LIST (OBTAIN A DIRECTORY) OF ALL FILES ON A DATA DISK

The operation of all these functions are extremely simple. To access 'DISK CONTROL' select option '8' from the Main Menu.

The following screen displays:

DISK

1. SAVE FILE
 2. LOAD FILE
 3. DELETE FILE
 4. FORMAT DISK
 5. LIST DIRECTORY
- SELECTION: __

Looking at each sub-option separately:

SAVE FILE

Simply allows you to save all your data onto disk, so that you do not lose it when you switch your Commodore 64 off.

EXAMPLE:

Select option '1' SAVE FILE

The following screen prompt displays:

FILE NAME: Respond with the file name you wish to save.

LOAD FILE

Allows you to load a specific file of information onto the system from disk.

EXAMPLE:

When using Schedule * 64 for the Racquet Club our File Name could

Saving Information

be RACQUET therefore each time we wish to access this information we simply load File Name:-RACQUET

Select option '2' LOAD FILE

The following screen prompt displays:

FILE NAME: Respond with the file name you wish to load from disk.

DELETE FILE

This utility allows for the deletion of a file from a storage disk. Care should be taken when exercising this option as once a file is deleted all the information concerning events, appointments, types and so on is deleted.

Select option '3' DELETE FILE

The following screen prompts display

FILE NAME: Respond with the name of the file you wish to delete.

FORMAT DISK

This function will be used when you require additional storage facility for your Schedule * 64 information. You may use a blank disk. This utility will format the disk so that it can store Schedule * 64 data, that can be saved and then re-loaded.

Select option '4' Format Disk

The following screen prompts display.

DISK NAME: Respond with the arbitrary name you have assigned to the disk that is in the disk drive at this time.

DIRECTORY

This utility simply allows you to obtain a listing, either on the screen or printed, of all the DATA FILES you have already established. With this you can use Schedule * 64 for many purposes simultaneously.

EXAMPLE:

FILE NAME: RACQUET (used for booking Courts)

FILE NAME: MEDICAL (used for the Doctors apply)

FILE NAME: HOME (used for personal appointments)

5.2 Exit

From the main menu, input '9' to exit from the Schedule * 64 program. Exit unloads the Schedule * 64 program from the system memory and returns you to the BASIC mode.

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Saving Information

be RACQUET thereafter each time we wish to access this information we simply load File Name: RACQUET

Select option '2' LOAD FILE

The following screen prompt displays:

FILE NAME: Respond with the file name you wish to load from disk.

DELETE FILE

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Select option '4' Format Disk

The following screen prompt displays:

DISK NAME: Respond with the arbitrary name you have assigned to the disk that is in the disk drive at the time.

DIRECTORY

This utility simply allows you to obtain a listing, either on the screen or printed, of all the DATA FILES you have already established with this system. You can see the Schedule * 64 information you have saved.

EXAMPLE:

FILE NAME: RACQUET (used for booking Courts)
FILE NAME: MEDICAL (used for the Doctors appointment)
FILE NAME: HOME (used for personal appointments)

5.3 Exit

From the main menu, you can exit the program by pressing the 'X' key. This will return you to the BASIC mode.

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To escape from whatever you are doing at the moment and return to the main menu of options, press the "—" key.

INST/DEL

To move all of the data one character to the left, press the INST/DEL key. This may be used to delete data or simply spaces.

INST/DEL

To move the data one character to the right, press the INST/DEL key in conjunction with the SHIFT key. Thus, a blank position is created for a necessary space, or the insertion of a character.

(CR)

To continue on with the program after a line of input, press the RETURN key.

SHIFT

To input the upper case convention of a letter, or to use the top portion of a special key, press and hold the SHIFT key in conjunction with the desired key. Then, release both keys at the same time.

To represent the screen's cursor, this symbol will be used to indicate the position where the next input character will be placed.

PLEASE NOTE: The Finance '84 menu screens are included throughout this manual. Due to page size restrictions, we have had to occasionally abbreviate prompts.

PREFACE

This manual is a tutorial approach to the FINANCE * 64 program.

Section I is an Introduction to FINANCE * 64. Also included, is an overview of the program and a list of specific user conventions referred to throughout this manual.

Section II provides a step by step description on how to turn on the equipment and load the FINANCE * 64 program.

Section III describes in detail each of the FINANCE * 64 menu options.

User Conventions

It is recommended that you familiarize yourself with the Commodore keyboard. Here is a brief description of certain keys and symbols, and their respective function in reference to Finance * 64 and this manual.

CLR/HOME

To return to the beginning of the screen you are working on, press the **CLR/HOME** key. All the data that has previously been input, will remain intact. This is referred to as the **Home** function.

To cancel and clear the field currently in operation, press **CLR/HOME** key in conjunction with the **SHIFT** key. The program will return to the beginning of the field. This is referred to as the **Clear** function.

←

CRSR

→

To move the cursor to the right, within the data entry field press the **CRSR** key. For cursor movement to the left, press the **CRSR** key in conjunction with the **SHIFT** key.

←

To escape from whatever you are doing at the moment and return to the main menu of options, press the ← key.

INST/DEL

To move all of the data one character to the left, press the **INST/DEL** key. This may be used to delete data or empty spaces.

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To move the data one character to the right, press the **INST/DEL** key in conjunction with the **SHIFT** key. Thus, a blank position is created for a necessary space, or the insertion of a character.

(CR)

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User Conventions

It is recommended that you familiarize yourself with the Conventions and keyboard. Here is a brief description of certain keys and symbols, and their respective functions in reference to Finance 84 and the manual. Some functions may be used in other programs and are to be used as a guide.

CLR/HOME
To return to the beginning of the screen you are working on, press the CLR/HOME key. As the date is not currently displayed, the CLR/HOME key is referred to as the CLR/HOME key. This is referred to as the CLR/HOME key in conjunction with the SHIFT key. The program will return to the beginning of the field. This is referred to as the CLR/HOME key.

CRSR
To move the cursor to the right, within the data only, press the CRSR key. For cursor movement to the left, press the CRSR key in conjunction with the SHIFT key.

←
To escape from whatever you are doing at the moment and return to the main menu of options, press the ← key.

INST/DEL
To move all of the data one character to the left, press the INST/DEL key. This may be used to delete data or empty spaces.

INST/DEL
To move the data one character to the right, press the INST/DEL key in conjunction with the SHIFT key. Thus, a blank position is created for a necessary space, or the insertion of a character.

(CR)
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PLEASE NOTE: The Finance 84 menu screens are included throughout this manual. Due to page size restrictions, we have had to occasionally abbreviate prompts.

SECTION I INTRODUCTION TO FINANCE * 64

1.1 Overview

Business is a serious game. Winning requires hard work and the information to make the right decisions. The more precise tools you have to make these decisions, the greater your chances of success.

By supplying correct information, Finance * 64 allows you to be able to make the right decisions, thus increasing your bottom line profits.

Finance * 64 features the necessary functions for the proper evaluation of corporate financial questions such as:

- Should we buy or lease a particular piece of equipment?
- How long will it take to recover the original investment?
- Can we afford to increase our debt portfolio? At what interest rate?

Also, Finance * 64 has useful functions for small businesses and private individuals.

The Finance * 64 package can accommodate questions such as:

- What will be the interest and principal for a thirty year mortgage?
- Considering my tax situation, would it be best to buy or lease a car? Boat? Large appliance?
- What is the future value (buying power) of my future earnings?
- At what price must I sell an article, if it cost me \$120 and I want to make a profit of twenty percent?
- Considering today's rampant inflation, what is the value of money I will receive in five years?

Finance * 64 is capable of generating these reports:

Buy vs Lease
Loan Analysis
Payback Analysis
Profit Margin

Following some important preliminary information, each of the above points will be discussed in detail.

SECTION I INTRODUCTION TO FINANCE * 64

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Finance * 64 is capable of generating these reports:

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Loan Analysis
Payback Analysis
Profit Margin

Following some important preliminary information, each of the above points will be discussed in detail.

2.1 Powering Up the Equipment

SECTION II GETTING STARTED

2.1 Powering Up the Equipment

Insert the Joystick port adapter into control port 1 before turning the computer on. (Make sure that it remains in place whenever the program is in use.)

Before turning on the power to the disk drive unit, lift up the disk drive doors to make sure no diskettes were left in the machine by mistake. Remove any diskettes to avoid possible loss of data.

There are three pieces of equipment to turn on: the computer, the disk drive, and a printer.

A few seconds after turning the power on, the screen should clear and display the following message:

Commodore 64 Basic V2

64 K Ram System 38911 Basic Bytes Free

Ready

2.2 Powering Down the Equipment

Before powering down any of the equipment, remove any diskettes which may be in the disk drive unit. (Be sure to store all of your diskettes in an envelope, in an upright position in a diskette notebook or case.) Turn the power switch to the "OFF" position.

2.3 Running the Finance * 64 Program

The Finance * 64 program is resident on the diskette that comes in the front cover of this manual. Follow the three easy steps listed below to load the program.

Step 1

Remove the diskette from the front cover pocket. Insert the diskette with the label face-up. Close the disk drive door.

Step 2

Enter: **LOAD "FINANCE * 64",8,1 (CR)**

The screen will display:

SEARCHING FOR FINANCE * 64

LOADING

READY

Enter: **RUN (CR)**

2.3 Running the Finance * 64 Program

The following screen will be displayed:

FINANCE * 64

DATE:

TIME

ENTER DATE USING MM/DD/YY FORMAT.

Step 3

Input the date in the following format:

MM/DD/YY (CR)

The prompt for "TIME" will then be displayed.

Input the time in the following format:

HH/MM (CR)

The following menu screen, itemizing the FINANCE * 64 operations that can be initiated, will be displayed.

DATE	Finance * 64	TIME
	1. BUY VS LEASE	
	2. LOAN ANALYSIS	
	3. PAYBACK ANALYSIS	
	4. FUTURE VALUE ORDINARY ANNUITIES	
	5. FUTURE VALUE ANNUITIES DUE	
	6. FUTURE/PRESENT VALUES	
	7. PROFIT MARGIN	
	8. EXIT	

SELECTION:—

NOTE:

If the port adapter is not used, the cursor will not appear beside the prompt SELECTION. This causes the program to lockup at this page. RETURN TO SECTION 2.1

To access the function of your choice, press the corresponding number, followed by (CR). The remainder of this manual is dedicated to the thorough discussion of the above choices, in the specified order.

3.1 Buy vs Lease Evaluation

SECTION III MENU OPTIONS

This section describes in detail the menu selections. Each description includes an introduction and an explanation of terms.

3.1 Buy vs Lease Evaluation

Input "1" (CR) to access the "Buy vs Lease Evaluation" option. This option provides a buy or lease recommendation after analyzing pertinent data regarding the acquisition of an asset. This option compares the cost of buying the asset, with the net cost of leasing. The present value at different interest rates, along with the of depreciation method desired (straight line, reduced balancing, and accelerated cost recovery), are taken into consideration before deciding on the best financial strategy.

Finance * 64 can also provide a printout of the input data, as well as the calculations performed.

After selecting the first option, the following menu will be displayed:

NAME:

TERM IN YEARS:

PURCHASE:

PURCHASE PRICE:

LOAN AMOUNT:

OTHER ANN CHRG:

DEP IN YEARS:

LOAN INTEREST %:

TERM IN MONTHS:

SALVAGE VALUE%:

DEPRECIATION CODE:

DECLINING BAL%:

LEASE

MONTHLY RENT:

OTHER MTHLY CHRG:

RENT TERM IN MOS:

RESIDUAL VALUE:

GENERAL

INCOME TAX RT%:

INVSTMT TAX CR:

PRES VAL DISC%:

The cursor will guide you through the required information slots.

The following list details each of the prompts involved with the 'Buy' section of this evaluation. **Press the return key to input a value of zero.**

PROMPTS

NAME

DESCRIPTIONS

The name of the asset or problem to be evaluated.

3.1 Buy vs Lease Evaluation (Cont.)

	Ex: If evaluating whether to buy or lease a new car, type in 'New Car', or the specific name of the car.
TERM IN YEARS:	The number of years to be considered. Ex: If the calculations involved are for acquiring a car, input '5' (CR).
PURCHASES	
PURCHASE PRICE:	The actual cash price, including tax. Input today's value of the asset.
LOAN AMOUNT:	The purchase price of the asset. If no loan is required, press the return key to input zero. Values other than zero will cause the right hand portion of the screen to be prompted. Ex: If purchasing a car for \$10,000, after a \$2,000 deposit, input '\$8,000' (CR) for the loan amount.
LOAN INTEREST %:	The loan interest rate.
TERM IN MONTHS:	The duration of the loan in months. Ex: For a five year car loan, input '60' (CR).
OTHER ANNUAL CHARGES:	The amount of any charges that may be incurred on a regular basis due to the asset. Ex: The maintenance and inspection costs for a car.
SALVAGE VALUE	The recoverable value of the asset at the end of its useful life. Ex: If purchasing a car for \$10,000, you estimate the car's trade-in value, in five years, to be \$1,500. Input '15' (CR) to specify 15 percent.
DEPRECIATION CODE:	Three choices of depreciation types are displayed on the lower right hand corner of the screen: <ol style="list-style-type: none">1. STRAIGHT LINE2. DECLINING BALANCE3. ACRS (Accelerated Cost Recovery System) Input the number corresponding to the depreciation code desired.
DEPRECIATION IN YEARS:	The number of years for the asset to depreciate.

3.1 Buy vs Lease Evaluation (Cont.)

DECLINING BALANCE %: The input for the declining balance percent is only required if option 2 of the depreciation code had previously been selected.

Thus, all the necessary terms and definitions for the 'Buy' section of this evaluation have been discussed. The following will detail the necessary 'Lease' information.

LEASE MONTHLY RENT: The monthly charge for leasing the asset, or pro-rate the annual charge by month.

OTHER MONTHLY CHRGS: Any expenses incurred on a monthly basis due to the asset. This is comparable to the 'Other Annual Charges' prompt in the purchase section.

RENT-TERM IN MONTHS: The duration, in months, of the proposed lease agreements.
Ex: For a five year lease, input '60' (CR).

RESIDUAL VALUE: The 'buy-out' figure at the end of the lease term, if the asset is then to be purchased.

This concludes the specific information for leasing an asset. The following information is common to both buying and leasing, and must be supplied for the comparison.

GENERAL INCOME

TAX RATE %: The specific tax bracket that you or the company are currently in.

INVESTMENT TAX CREDIT: If the purchase of the particular asset qualifies for tax credit, input the dollar amount.

PRESENT VALUE DISC %: Finance * 64 prepares a recommendation based on evaluating money at today's value.
Input the present value percent that future money must be discounted back to, in order to be comparable to today's value.

The required information for the 'BUY vs LEASE EVALUATION' is now completed. **Watch your screen for the recommendation.**

The final prompt for each of Finance * 64's options will be '**PRINT THE ABOVE ANALYSIS (Y/N)?**'. For a hard copy of the input data, calculations, and recommendation, input a '**Y**' (CR). **ONCE THE**

3.2 Loan Analysis

DATA IS PRINTED THE SCREEN INPUT WILL CLEAR, THE CURSOR WILL BE POSITIONED FOR THE NEXT EXAMPLE.

If no printout is desired, input 'N' (CR) to the 'PRINT THE ABOVE ANALYSIS (Y/N)?' prompt. Another example can then be entered.

3.2 Loan Analysis

From the Finance * 64 main menu, input '2' (CR) to access the second option of Finance * 64. 'Loan Analysis', calculates the effective interest rate, the payment amount (in interest and principal), or the monthly/annual schedules. The Loan Analysis option utilizes the three critical variables of every loan, i.e. the loan principal, the life of the loan, and the monthly loan payments.

The option may also be used for transactions other than loan analysis. Here are a few examples:

- The cost and profit are known. Calculate the monthly charges required for the item.
- The cost is known. Calculate the profit (net present value) on a rented or leased item.
- The profit is known. Calculate the cost of a rented or leased item (net present value).

After the 'Loan Analysis' option has been selected, the following screen will be displayed:

1. Calculate Payment
2. Calculate Principal
3. Calculate Life

Each of the above three calculations will be discussed in detail.

To calculate monthly payments, select option '1' (CR). The following screen will be displayed:

CALCULATE PAYMENT

**PRINCIPAL AMOUNT
BALLOON PAYMENT
AMOUNT AMORTIZED
LIFE IN MONTHS
MONTHLY PAYMENT
NOMINAL INTEREST %
COMPOUNDED CODE (A,S,M)
EFFECTIVE INTEREST %**

Note: A similar screen will be displayed for all three options under 'Loan Analysis'. The screen heading will reflect the option you chose, and the cursor will prompt specifically for the information required to complete that particular calculation. **Press the return key to input a**

3.2 Loan Analysis (Cont.)

value of zero.

The following is a detailed description of all the information blocks for each of the input screens:

PROMPTS	DESCRIPTIONS
PRINCIPAL AMT	The amount of the loan.
BALLOON PAYMENT	The amount of money to be paid at the end of the term of the loan. The balloon payment is not included in the amount amortized, but is included in interest calculations, because the payment is not made until the end of the loan.
AMT AMORTIZED	The 'Amount Amortized' is calculated automatically by Finance 64.
LIFE IN MONTHS	The number of months that the loan will be held.
MONTHLY PAYMENT	The monthly payment amount.
NOMINAL INTEREST RATE:	The interest rate as quoted, not the effective interest rate. Finance 64 will automatically calculate the effective interest rate.
COMPOUNDED (A/S/M):	The three compound codes, A/S/M, are abbreviations for the following: A — Annual compounding S — Semi-annual compounding M — Monthly compounding
EFFECTIVE INTEREST RATE:	Finance * 64 automatically calculates the effective interest rate.

According to the data input, the loan calculations will be performed. Watch your screen for the answers.

The program will display '**PRINT THE ABOVE ANALYSIS (Y/N)?**'. Input an '**N**' (CR), if no printout is desired. You are then returned to the Loan Analysis main menu. Input a '**Y**' (CR) for a printout of the information. The following screen is then displayed:

1. ANNUAL TABLE
2. MONTHLY TABLE

SELECTION:—

Input the number corresponding to the desired table. The following screen will then be displayed:

START YEAR

3.2 Loan Analysis (Cont.)

START MONTH NUMBER OF MONTHS

Each of these prompts are described below.

PROMPTS

DESCRIPTIONS

START YEAR

The year in which the loan analysis is to begin.

START MONTH

The first month of the calculation. Input the numerical equivalence for the desired month, i.e. January would be 1; February, 2

NUMBER OF MONTHS

The number of months that are to be printed. This can be several months, or the entire time period.

After the requested printout is complete, you will be returned to the Finance * 64 main menu.

3.3 Payback Analysis

Input '3' (CR) to access the 'Payback Analysis' option from the Finance * 64 main menu. This option determines the length of time necessary to recover the capital invested on an asset by analyzing the net cash flow generated by the asset. This option is extremely valuable for comparing the payback periods of several assets before an actual investment has been made.

The following input screen will be displayed:

PAYBACK ANALYSIS

ASSET INFORMATION:

NAME:

COST:

SERVICE LIFE:

INCOME TAX RATE %

ANNUAL SALES:

UNITS PRODUCED:

PRICE PER UNIT:

COSTS PER UNIT:

MATERIAL:

LABOR:

OVERHEAD:

SALES/ADMINISTRATION:

Here is a detailed description of the 'Payback Analysis' prompts:

3.3 Payback Analysis (Cont.)

PROMPTS	DESCRIPTIONS
NAME	The name of the asset to be analyzed.
COST	The purchase price of the asset.
SERVICE LIFE	The useful life of the asset.
INCOME TAX RATE%	The specific tax bracket that you or the company are currently in.
UNITS PRODUCED	The number of units the asset will produce in one year.*
PRICE PER UNIT	The actual sale price for each individual unit.
MATERIAL LABOR OVERHEAD SALES/ADM	Input the associated costs per unit.

***NOTE:** If the asset does not produce units, input '1' (CR) for "Units Produced". Then, input the revenue the asset is expected to produce annually for "Price per Unit".

The evaluation is then completed. The **Investment Recovery** Prompt is displayed with the appropriate answer (in years, or a portion of a year). By comparing various alternatives, Finance * 64 can help determine which investment yields the greatest profit and is capable of the shortest investment recovery period.

If a printout is desired, input 'Y' (CR) to the '**PRINT THE ABOVE ANALYSIS (Y/N)?**' prompt. The information on the screen will be printed, along with the associated cost and tax information which includes: Annual Sales, Annual Costs, Depreciation, Income Before Taxes, Income Tax, Income After Taxes, Annual Net Cash Flow, Cost of New Asset, and Years to Recover Investment. You will then be returned to the main menu screen. If no printout is desired, input an 'N' (CR), to return to the 'Payback Analysis' menu screen. More data may now be entered.

3.4 Future Value of Ordinary Annuities

Input '4' (CR) to access the 'Future Value of Ordinary Annuities' option from the

Finance * 64. This option calculates the future value amount. An annuity is any series of equal payments which are made at regular intervals called payment periods. There are two types of annuities:

Ordinary Annuities — Payments are due at the beginning of each period. Also, referred to as payments in arrears.

Annuities Due — Payments are due at the end of each period.

A loan establishes some debt of value that must be repaid, with inter-

3.4 Future Value of Ordinary Annuities (Cont.)

est, by a series of set payments, for a fixed length of time. With ordinary annuities, the interest from the last payment period does not accrue since the payment is made at the end of the period.

With this option of Finance * 64, solutions can be determined for the following:

Tom wants to buy a house in three years. He needs \$10,000 as a downpayment. Each month, how much must Tom save and invest at ten percent compounded monthly?

Given the amount for each payment, what is the future value of all 36 payments at the investment rate of ten percent compounded monthly?

After the 'Future Value Ordinary Annuities' option is selected, the following screen will be displayed:

FUTURE VALUE ORDINARY ANNUITIES

- 1. CALCULATE FUTURE VALUE**
- 2. CALCULATE MONTHLY PAYMENTS**

SELECTION:—

LIFE IN MONTHS:
NOMINAL INTEREST %:
COMPOUNDED CODE (A/M):
MONTHLY PAYMENT:
VALUE OF FUTURE AMOUNT:

The following prompts are required for both the future value and monthly payment calculations:

PROMPTS	DESCRIPTION
LIFE IN MONTHS	The number of monthly payments that are required to satisfy the loan.
NOMINAL INTEREST RATE %	The rate of interest the investment will earn.
COMPOUNDED CODE (A/M)	The interest is to be compounded annually or monthly.

If the future value is to be calculated, the MONTHLY PAYMENT prompt will automatically be requested. Input the monthly investment amount.

If the monthly payments are to be calculated, the Value of Future Amount prompt will automatically be requested. Input the desired future amount.

If a printout is desired, input 'Y' (CR) to the 'PRINT THE ABOVE ANALYSIS (Y/N)?' prompt. After the data is output, you will be re-

3.5 Future Value Annuities Due

turned to the main menu screen. If no printout is necessary, input 'N' (CR) to return to the Future Value of Ordinary Annuities menu screen.

3.5 Future Value Annuities Due

Input '5' (CR) to access the 'Future Value Annuities Due' option. Also called payments in advance, 'Future Value Annuities Due' payments are made at the beginning of each payment period. Examples of annuities due are insurance premiums and rent payments. Because annuities due payments are made at the beginning of the period, interest is credited for that time. With ordinary annuities, interest does not accrue until the end of the next period.

The following screen will be displayed:

FUTURE VALUE ANNUITIES DUE

1. CALCULATE FUTURE VALUE
2. CALCULATE MONTHLY PAYMENTS

SELECTION:—

LIFE IN MONTHS:

NOMINAL INTEREST %:

COMPOUNDED CODE (A/M):

MONTHLY PAYMENT:

VALUE OF THE FUTURE AMOUNT:

The following prompts are required for both the future value and monthly payment calculations:

PROMPTS

DESCRIPTIONS

LIFE IN MONTHS

The number of monthly payments that are required to satisfy a loan.

NOMINAL INTEREST RATE %

The rate of interest the investment will earn.

COMPOUNDED CODE (A/M)

The interest is to be compounded annually or monthly.

If the future value is to be calculated, the **MONTHLY PAYMENT** prompt will automatically be displayed. Input the monthly investment amount.

If the monthly payments are to be calculated, the **Value of Future Amount** prompt will automatically be displayed. Input the desired future amount.

The result of the desired calculation will be displayed on the screen. If a printout is desired, input 'Y' (CR) to the 'PRINT THE ABOVE ANAL-

3.6 Future/Present Values

YSIS (Y/N)? prompt. After the data is output, you will be returned to the main menu screen. If no printout is necessary input **'N'** (CR) to return to the **'Future Value of Ordinary Annuities'** screen.

3.6 Future/Present Values

Input **'6'** (CR) to access the **Future/Present Values** option. This option calculates the future value of today's given amount, or the present value of a given amount:

A dollar received a year from now is valued at less than a dollar received today. A dollar received today can be invested to receive interest throughout the year. With an annual interest rate of five percent, the dollar invested earns a nickel in one year. Thus, the future value is \$1.05.

Conservely, a future value can be discounted to the present time to obtain the Present Value (equivalent value).

After the **'Future/Present Values'** option is selected, the following screen will be displayed:

FUTURE PRESENT VALUES

- 1. CALCULATE FUTURE VALUE**
- 2. CALCULATE PRESENT VALUE**

SELECTION: —

LIFE IN MONTHS:
DISCOUNT RATE %:
PREENT VALUE:
FUTURE VALUE:

The following prompts are required for both the Future Value and Present Value calculations:

PROMPTS

DESCRIPTIONS

LIFE IN MONTHS

The number of monthly payments that are required to satisfy the loan.

DISCOUNT RATE %

The rate of interest the investment will earn.

If the Future Value is to be calculated, the PRESENT VALUE prompt will automatically be displayed. Input today's value of the total amount.

Example: One hundred dollars today, at a discount of five percent per year, has future value of \$105.

If the Present Value is to be calculated, the Future Value prompt will automatically be displayed. Input the total value desired for a certain future point in time.

3.7 Profit Margin

Example: One hundred dollars in one year in the future, at a discount rate of five percent, has a present value of \$95.13.

The result of the specified calculation will be displayed on the screen. If a printout is desired, input 'Y' (CR) to the **PRINT THE ABOVE ANALYSIS (Y/N)?** prompt. You will be returned to the main menu screen after the data is output. If no printout is necessary, input 'N' (CR) to be returned to the **'FUTURE/PRESENT VALUE'** screen. New data may then be input.

3.7 Profit Margin

The seventh menu option of Finance * 64, 'PROFIT MARGIN', provides the easy handling of cost, sale price, and profit margin calculations. All calculations are based on the following equation:

PROFIT MARGIN (%) =

$$\frac{\text{SELLING PRICE} - \text{COST PRICE} \times 100}{\text{SELLING PRICE}}$$

The above formula can be rearranged to provide the **COST PRICE**, if given the **SELLING PRICE** and desired **PROFIT MARGIN**. Also, the **SELLING PRICE** can be calculated, if the **COST PRICE** and desired **PROFIT MARGIN** are known. Here is a sample problem that the Profit Margin option can solve:

Determine the necessary Selling Price for a few new books in your bookstore, if they cost \$4.50, \$9.90, and \$15.30, and a profit margin of 28 percent is required.

Input '7' (CR) to select the 'Profit Margin' option from the Finance 64 main menu. The following screen will be displayed:

PROFIT MARGIN

- 1. CALCULATE MARGIN**
- 2. CALCULATE COST**
- 3. CALCULATE PRICE**

SELECTION: —

SELLING PRICE:

COST:

MARGIN PERCENT:

Select the calculation option desired:

CALCULATE MARGIN — To calculate the Profit Margin, given the proposed Selling and original Cost Price.

CALCULATE COST — To calculate the Cost Price, given the Profit Margin and Selling Price.

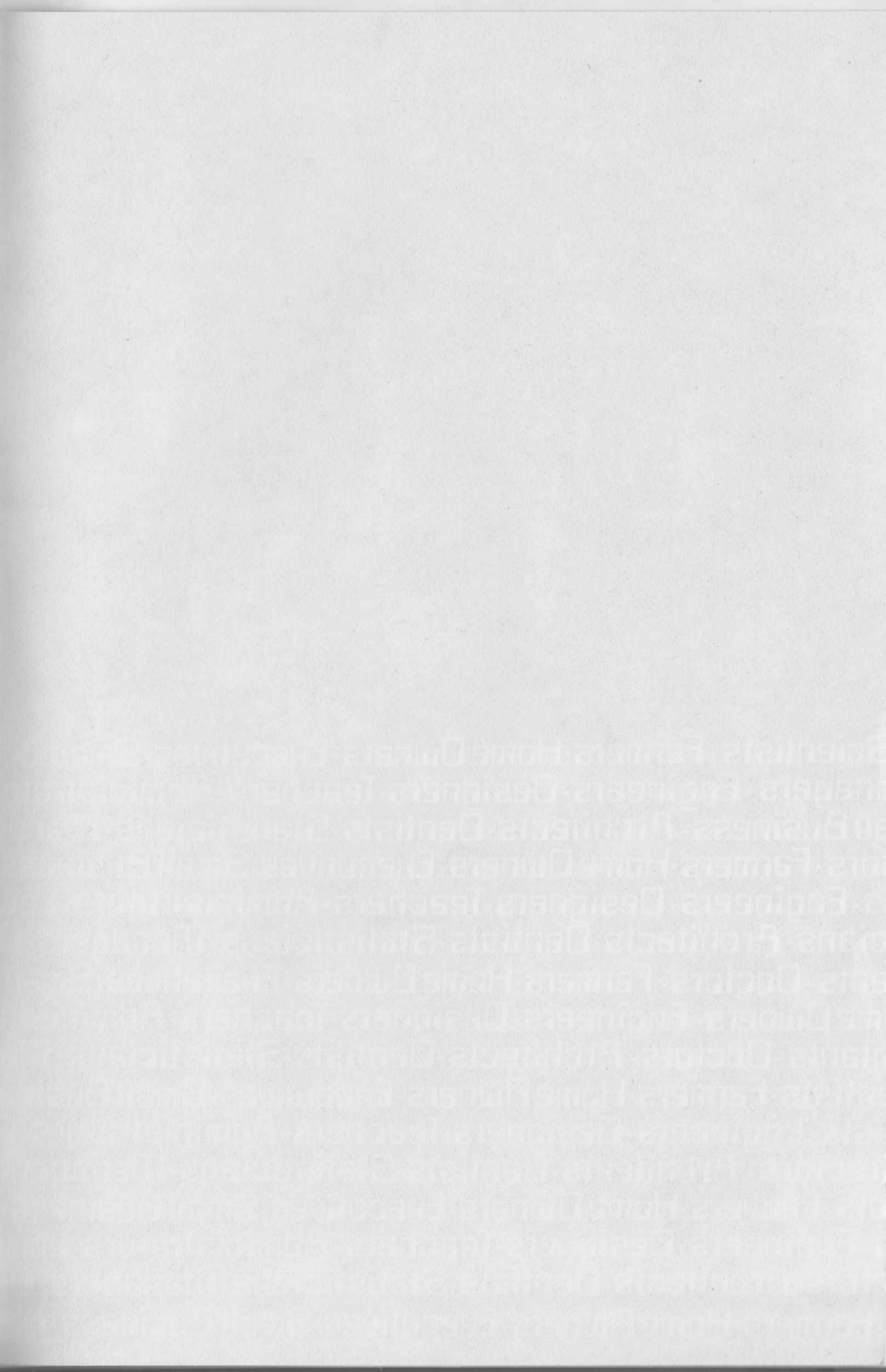
3.7 Profit Margin (Cont.)

CALCULATE PRICE — To calculate the Selling Price, given the Profit Margin and Cost Price.

Finance 64 prompts for the necessary information to complete the desired calculation. The result is displayed on the screen. If a printout is desired, input 'Y' (CR) to the '**PRINT THE ABOVE ANALYSIS (Y/N)?**' prompt. You will be returned to the main menu screen after the data is output. If no printout is necessary, input 'N' (CR). You are then returned to the Profit Margin menu.

3.8 Exit

From the main menu, input '8' (CR) to 'exit' from the Finance * 64 program. **Exit** unloads the Finance * 64 program from the system memory and returns you to the BASIC mode.



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